

## Daily Operations

Daily operations records include the Food Production Record and the Record of Participation and Income. Additional records that are used on a daily basis may be found in Section 11, Counting and Claiming, and Section 16, Afterschool Snack Program.

### Food Production Records

A food production record is a required daily written plan for the production of each program meal or snack served. After the meal or snack service when additional information is added to complete the record, it also provides a written history of the quantity of each menu item that was prepared and served. A complete and accurate food production record must be maintained by the school food authority (SFA) on all meals and snacks claimed for reimbursement. Food production records are the only record that demonstrates that the meals and snacks served and claimed met meal requirements and were therefore reimbursable. This requirement applies to breakfasts, snacks, and lunches—including salad and other food bars, quick lines, sack lunches, meals in the classroom, etc. Any meal or snack claimed for reimbursement must be supported by a food production record. This form and other records that serve as supporting documentation for reimbursement claimed must be maintained for three years plus the current year.

### Review Requirements

During a program review or audit, two methods are used to evaluate menus with regard to meeting minimum requirements of the child nutrition meal or snack:

- meals served on the day of the review are observed, and
- menus and production records for the review day meals and previously served meals are examined.

Overclaims must be assessed for meals served on the day of the review that do not meet the minimum meal requirements. Additional overclaims may be assessed if production records for previously served menus indicate that meals were missing

components or serving sizes did not meet requirements.

### Master Production Records

In school districts with more than one production site (i.e., several schools, each with their own kitchen) it is wise to consider developing centrally planned menus and recording the menu, portion sizes, and other critical information on a master copy of the production record for each menu day. This copy can then be distributed to each production site to be completed with site-specific information such as the number of servings to prepare, quantity to prepare, leftovers, and comments. In addition to being an excellent method to communicate menu information to food service personnel, this system can serve as a safeguard against reimbursement being reclaimed during an audit due to a busy kitchen manager inadvertently omitting a meal component from the production record for the day.

### Other Uses

In addition to meeting the Federal requirement, production records are valuable tools in the operation of a successful food service program. They provide

- records of how food was used,
- a history of student acceptance of menu items,
- a tool to forecast and plan the type and quantity of food items to prepare for future menus,
- communication of information essential for cost control, and
- valuable information for cashiers to use in determining whether a reimbursable

meal has been selected under the offer vs serve guidelines.

Many school districts include information beyond the basic requirements, such as temperature tracking or work assignments. This practice can expand the usefulness of this record to include

- a method to assign and track staff responsibility for menu item production,
- a record of safety and sanitation data such as serving temperatures,
- an instructional tool for new staff regarding serving utensils to use for various portion sizes,
- communication of required pre-preparation for menus to be served in the future, or
- instructions for handling of leftovers.

## Food Production Record Instructions

A food production record may be very simple or very detailed. The SFA may elect to use the prototype forms provided in this section (forms 1 through 3), or to develop other forms more suitable to the individual needs of the SFA. Sample forms provided in this section may be used for the Traditional Food Based Menu Planning option, the Enhanced Food Based Menu Planning option, Nutrient Standard Menu Planning, or Assisted Nutrient Standard Menu Planning. Full size forms for printing are found in Section 27 of this manual. At a minimum, the following information must be included on food production records for reimbursable meals.

### Menu Items

This information must include all foods prepared and served as part of the reimbursable meal. Such items as desserts and condiments must be included, even though they may be extra items that do not contribute to the meal. Note: Making good use of leftover foods often means offering them as an additional choice against another menu item planned in advance. Remember to record

these additional menu items as part of the day's production. Otherwise, it will appear as though not enough food was prepared.

### Meal Contribution

—Traditional Food Based, Enhanced Food Based, and Afterschool Snack

Include the component amount to be credited for each menu item served. Indicate the Meat/Meat Alternate (M/MA) in ounces for meat items or cups for items such as beans or yogurt, the Grains/Breads (GB) in GB equivalents, the Vegetable/Fruit (VF) in cups, and the Milk (M) in fluid ounces or cups. Example: Depending on the recipe used, a barbeque sandwich with lettuce, tomato and pickles might be documented as 2 oz. M/MA, 2 GB, 1/4 cup VF.

—NuMenus and Assisted NuMenus

Document the menu items offered as Entree (E), Side Dish (SD), or Milk (M). No entree designation is needed for breakfast.

### Portion Size

Indicate the portion size of the menu item as it is served. This may be the same as the measurement shown in the Meal Contribution column (i.e., 1/4 cup as the portion size and 1/4 cup VF as the meal contribution for peas), or the information may be different (i.e., 1/2 cup as the portion size and 1/4 cup VF as the meal contribution for cherry cobbler).

The information in this column must clearly show the size portion that was served to the student. If a weight or volume measurement does not best describe the portion size of a menu item, it may be listed in a more useful manner (i.e., 5 each for chicken nuggets). However, be sure that some form of documentation such as a standardized recipe, CN label, or product analysis sheet is available to support the crediting of the indicated portion size for items that are preprocessed.

### Number of Servings Planned

Indicate the number of servings to be prepared on an item-by-item basis. In addition to guiding food

## Form 1 Section 8B Food Production Record Enhanced Menu Planning Option

Form 2 Section 8B Food Production Record Traditional Menu Planning Option8B-3

## Form 3 Section 8B Food Production Record NuMenu/Assisted NuMenu Planning Option

| <b>Food Production Record</b><br><b>NuMenu/Assisted NuMenu Planning Option</b> |                    | <input type="checkbox"/> Breakfast<br><input type="checkbox"/> Lunch |                  |  |        |                           |          |
|--|--------------------|--|------------------|--|--------|---------------------------|----------|
| Date: _____<br>School: _____<br>Grades Served: _____<br>Manager: _____         |                    | <b>MENU</b>  |                  | <b>Total Meals Served:</b><br>Students: _____<br>Adults: _____<br>Total: _____ |        |                           |          |
| Menu Items   | Meal Contribution* | Portion Size   | Servings Planned | Quantity Prepared<br>(Recipe #, lbs, #10 cans, ea, cases, etc.)                |        | Leftover (+)<br>Short (-) | Comments |
|  |                    |  |                  | Forecasted   | Actual |                           |          |
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|  |                    |  |                  |  |        |                           |          |

\*E=Entree; SD=Side Dish; M=Milk

production for the day, this number will be used when performing a nutrient analysis of the menu.

### -Nutrient Analysis Using Simple Averaging

When the SFA is completing a nutritional analysis using the simple averaging method (current State office method):

- If portion sizes vary for different student age/grade groups, the number of servings planned must be listed separately for each age/grade group.
- When portion sizes are the same for all served there is no requirement to record these numbers separately.
- A la carte/special sales and adult planned servings may be listed separately or may be included in the overall number of servings to prepare if portion size is the same.

### -Nutrient Analysis using Weighted Method

When the SFA is completing a nutritional analysis using the weighted method:

- The number of servings planned must be listed separately for each age/grade group, regardless of serving size.
- A la carte/special sales and adult planned servings must be listed separately.

### Quantity Prepared—Forecasted and Actual

Indicate the amounts of food to prepare to yield the number of servings planned of the serving size indicated. List these foods in purchase units such as pounds, #10 cans, cases, or gallons. When in doubt as to how to list a particular food with regard to purchase units, check to see how the food is listed in the Food Buying Guide. The forecasted column will show a sufficient quantity to provide the specified serving size for the number of planned servings indicated. The actual column will be filled in only if different from the forecasted amount.

### Leftover or Short

The amount of food left after the serving period or short before service ends may be indicated by number of servings, weight, volume, or any other

appropriate measurement. Note: If the number in this column is always a zero, this indicates that not enough food is being prepared. Even the best production planners would have a difficult time coming out exactly even every day. Likewise, most kitchens run out of one food or another occasionally. When this occurs, document on the production record the substitute food item and the number of portions substituted. If a potential shortage is noted early enough in the serving period to introduce a choice, enough customers may select the alternate food item so that no one is disappointed.

**Total Meals Served**

Record the total number of student reimbursable meals and adult meals served. When the SFA chooses to perform weighted nutrient analysis, this number must be available by student age/grade groupings. Do not include a la carte/special sales or second servings in the count for total meals served.

**Comments**

This area may be used to communicate information needed relative to the production of the menu items (i.e., servings per purchase unit or specific directions re. presentation or use of leftovers). In addition, information can be added in this column after the meal service (i.e., comments regarding acceptability of menu items to customers or special circumstances affecting participation). This type of clarification is important to substantiate menu changes or differences in participation numbers. Note: The purpose of recording this information on the food production record is

- to direct production,
- to record production information that may be used in forecasting for future menus, and
- to support claims for reimbursement.



directly related to the preparation and service of the meal is needed to qualify for an inkind meal.

**Column 8:** Student payments for meals

**Column 9:** Adult payments for meals

**Column 10:** Special sales/a la carte payments received from students

**Column 11:** Special sales/a la carte payments received from adults

**Column 12:** Source of other revenue

**Column 13:** Amount of other revenue received

**Column 14:** Total income received for the day

**Column 15:** Total bank deposit for the day entry

**Total** all columns.

Enter the **number of students eligible for free** reimbursable meals and the **number of students eligible for reduced-price** reimbursable meals. Use the highest daily number of student eligibility during the month.

Notes: